



USDA Foreign Agricultural Service

GAIN Report

Global Agriculture Information Network

Template Version 2.09

Required Report - public distribution

Date: 9/30/2005

GAIN Report Number: NI5020

Nigeria

Exporter Guide

Annual

2005

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Report Highlights:

Nigeria's food processing and agricultural sectors are showing some growth but high tariffs and non-tariff barriers on imports continue to limit opportunities. Demand for intermediate foods and ingredients (including concentrates and flavors) as well as HRI products, are rising. A huge market also exists for frozen fish, poultry/aquaculture feedstuffs/ingredients as well as mixed containers of grocery products that are legitimate for export to Nigeria.

Includes PSD Changes: No
Includes Trade Matrix: No
Annual Report
Lagos [NI1]
[NI]

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SECTION I. MARKET OVERVIEW

- ❑ Nigeria, with a population of more than 133 million, growing at three percent per annum, is the largest market in sub-Saharan Africa. It also provides a bonus market for the more than 30 million consumers residing in the neighboring West African countries. According to the Economist Intelligence Unit (Feb 2005), real GDP growth is estimated at 10.2% in 2003 and 4.5% in 2004. Inflation is forecast to go down slightly from 15% in 2004 to approximately 11% in 2005 and 2006. Petroleum exports accounts for about one third of GDP, 98 percent of total export earnings and close to 80 percent of federal government revenue. Agriculture is primarily subsistence but holds about a one third share of GDP. About 70 percent of Nigeria's population is employed in agriculture. The agricultural sector has seen some growth over the last several years. However, it remains under-developed and basic bulk food products are still imported.
- ❑ The GON's high protective wall [import bans, high tariffs and more demanding regulations on imports of high value products (HVP)] has assisted Nigeria's food processing activities to increase over the last few years. Foreign investment in the sector has also increased. Bulk commodities such as wheat and sugar hold the major value of inputs used in this sector. There is demand for imported beverage-based products (especially, fruit juice concentrate, pre-mixes & syrup), ice cream pre-mixes, spices, flavors, and nutrients/additives. The sector however, remains under-developed due mainly to poor infrastructure and inconsistent Government of Nigeria (GON) policies.
- ❑ The GON restrictive policies have reduced legitimate imports and increased informal import practices such as cross-border smuggling and corrupt practices at Nigerian ports. Nigeria as a signatory to the Common ECOWAS Tariff (CET) agreement, which seeks to eliminate import bans and replace them with relatively lower tariffs, among member states of the economic union. HVP imports into Nigeria would increase if Nigeria adheres to implementing its CET agreement.
- ❑ Nigeria's changing demographics and lifestyles have continued to influence the continued growth of Nigeria's food service (HRI) sector especially, hotels and fast food chains. The increasing local demand for fish, the global dwindling fish stock with the mounting GON campaign for increased local aquaculture activities, output from the aquaculture sector is expected to increase in the upcoming years. Demand for aquaculture feed products and ingredients is rising.
- ❑ Domestic food products such as corn, sorghum, tubers, and seafood (fish) are the major traditional foodstuffs consumed by the majority of the population. Estimated agricultural products' imports for 2003 are \$2 billion and exports, \$400 million. US agricultural exports to Nigeria increased to approximately \$444 million (mainly wheat) in CY 2004, up from \$322 million in CY2003. Asia and Brazil are the major suppliers of other bulk commodities such as rice, and sugar, respectively. The EU, Asia and South Africa are leading suppliers of processed and intermediate products to Nigeria. Nigeria will likely continue to import wheat, rice and high-value food products (HVP) with its increasing urbanization and as families demand more convenience foods.
- ❑ Constraints to U.S. exports to Nigeria include--restrictive trade regime, competition from the EU and Asian countries, negative image of Nigerian businesses etc. U.S. exporters are however, advised to persevere in this market. As business relationships with Nigerian firms endure, the apprehension of doing business in this market will be overcome.

Advantages & Disadvantages

Advantages	Disadvantages
Nigerian consumers' perception of U.S. foods as higher quality items.	Limited knowledge of the Nigerian market among the U.S. trade.
Nigerian consumers readily adapting U.S. tastes and preferences especially for convenience-typed foods and snacks	Low consumer purchasing power quality.
Increasing demand for convenience-type foods due largely to: a continued massive rural-urban migration, increasing female workers and school-attending children.	Labeling of "Best Before Dates" on U.S. HVPs is confusing to Nigerian consumers. The "Day/Month/Year" order or a spell-out of months is understood.
Growing number of discerning Nigerian consumers demanding more varieties of hygiene and nutritious foods.	Shorter shelf life labeling of U.S. HVPs.
Increasing demand for intermediate foods (such as concentrates, flavors and ingredients), HRI products, seafood, seafood-based ingredients as well as consolidated, mixed containers of grocery products.	Limited local infrastructure; limited operational capital; high local production cost; and unstable GON import policy.
Adoption of 'Global Listing for Supermarket' items by food regulatory authorities offering relatively low cost, low risk market-entry window for HVPs not banned for imports.	Limited contact; negative perceptions about Nigerian businesses among U.S. exporters and a reluctance to do business in Nigeria.
Nigerian firms generally see U.S. suppliers as a reliable source, in terms of volume, standards and quality.	GON's import ban and high tariffs on many HVP.
Relatively lower fob prices for higher quality U.S. ingredients.	Direct U.S. to West African shipping routes is infrequent—transshipments, often made at EU & South African ports add to cost and longer shipping time.

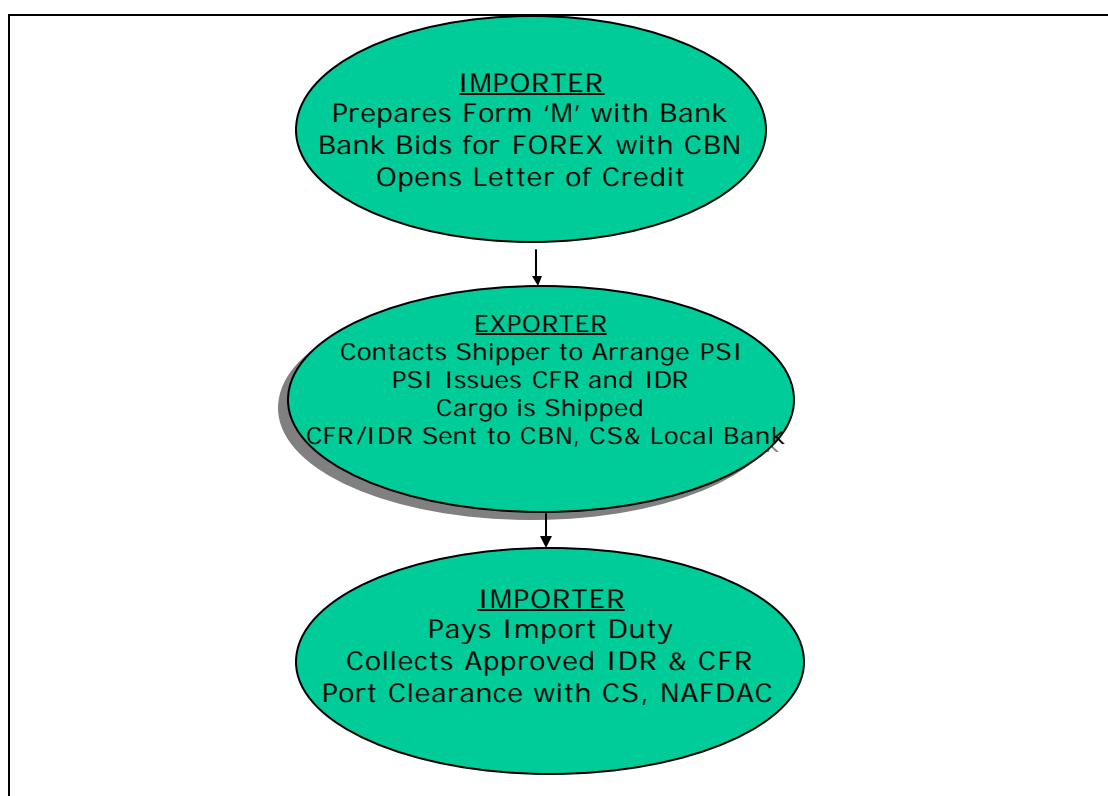
SECTION II. EXPORTER BUSINESS TIPS

- ❑ Importer preferences are evident for HVP with the following characteristics:
 - Relatively small-sized products, prepared and packaged for affordable one-time use
 - Bulk, intermediate products and ingredients (especially, beverage bases and flavors) for local re-processing and packaging
 - Mixed-containers of high-value products and brands that are free for imports
 - Perishable food products processed and packaged for long shelf life without refrigeration
- ❑ All processed foods must be registered with NAFDAC to be legally importable into Nigeria:
 - Application for registering regulated products is made by the manufacturer
 - Foreign manufacturers must appoint a duly registered Nigerian firm to represent them and handle their product registration with NAFDAC. This firm is a local importer-distributor desiring to solely distribute exporter's products in Nigeria
 - Although an independent firm, NAFDAC considers the local importer to be acting as a representative of the foreign manufacturer
 - Not more than one firm can register a product. This is mostly for NAFDAC's effective control and to enable it to easily contact a product applicant when necessary
 - Usually, it is the responsibility of the importer to defray the cost of product registration with NAFDAC but the manufacturer/exporter will need to provide the local firm with the documents required by NAFDAC to register the product
 - NAFDAC's registration fee on imported HVPs varies with the exchange rate at the time of product registration but ranges between \$5,500 and \$6,000 per item.
- ❑ NAFDAC's adoption of global listing of supermarkets (GLS) food items has created another convenient and less expensive alternative for the Nigerian importer-distributors of HVP
 - The GLS allows importer-distributors to import mixed container loads of high-value food products
 - Items listed under GLS include all items regulated by NAFDAC, which are sold in supermarkets and other specialties required by hotels, fast food chains and international organizations
(See GAIN Report No: NI4015 for details)
- ❑ The Nigerian Customs Service (NCS) is the GON agent for import duty collection
 - Import duties for HVPs run an average of 100 percent high
 - All HVP imports are assessed at 5 percent Value Added Tax (VAT)
 - The 5 percent VAT is on CIF value plus (+) import duty + port surcharge assessed at seven percent of import duty + one percent of import duty called Customs Service inspection charge

- ❑ GON initiated a policy that subjects all imports into the country to a duplicate inspection since May 2001
 - A pre-shipment inspection (PSI) in the country of export by a GON-appointed PSI agent prior to shipment, and
 - A-100 percent destination inspection at Nigeria's port of entry
 - PSI agent for imports shipped from the United States is Swede Control/Intertek--the shipper or exporter arranges for the PSI to be done (See GAIN Report #: NI4015 for details)
- ❑ The Federal Fisheries Unit of Nigeria's Department of Agriculture (Federal Ministry of Agriculture and Natural Resources regulates frozen fish imports into Nigeria.
 - It issues import licence to firms applying to import after due certifications
 - Licenses are issued per import purchase and shipment [See GAIN Report #: NI4012 (SECTION III) for details]
- ❑ Nigeria's high-tariff regime encourages many Nigerian importers to engage in informal business practices.
 - Importers (of especially high-value food commodities) reportedly, have continued to collude with PSI agents and local port officials in their customary product concealment and under-invoicing to either reduce or avoid duty payment--rules can be bent to move imports into Nigeria.
 - Allegedly, the Pre-Shipment Inspection agents in the U.S. are stricter than their counterparts in other countries
 - Nigerian HVP importers often ship their U.S. consignments to the EU countries where the consignments are re-inspected by the more flexible pre-shipment agents in those countries, re-documented and transshipped to Nigeria
 - Nigerians also, ship their consignments to ports in neighboring countries where they enter the Nigerian market by road through cross-border smuggling chain
 - Many Nigerian importing firms register companies in the neighboring West African countries specifically, for receiving and transiting their consignments to the Nigerian market
 - A large proportion of HVP exported to other West African countries are sold in the Nigerian market
 - Nigerian importers may purchase these items directly from overseas or they may purchase from importers of neighboring countries.
- ❑ Following are documentations, procedural steps as well as the estimated durations procedures for all exports to Nigeria:
 - Importer contacts his local bank with import documents such as invoice/s, insurance certificate/s, etc, so the 'Form M' can be prepared. The bank needs the 'Form M' to apply for foreign exchange from Nigeria's Central bank (CBN) to pay for the goods.
 - A Clean Report of Findings (CFR) number is assigned after the CBN approves the use of foreign exchange. (Average two days).
 - The local bank bids for the required foreign exchange. Often, banks do not obtain foreign exchange for the total invoice value from the CBN and will need to bid multiple times. Importer opens a Letter of Credit for the purchase. (Average two weeks)

- Exporter contacts his shipper to arrange pre-shipment inspections (PSI) with GON's agent (Intertek/Swede Control). The PSI agent issues Clean Report of Findings (CFR) and, Import Duty Report (IDR), which validate the commodity being shipped and, its valuation for import duty purposes.
- Cargo is shipped (on average, transport time from the U.S. to Nigeria is three weeks).
- The PSI agent sends both CFR and IDR to CBN and Nigeria Customs Service (NCS) as well as forwards copies of the IDR directly to the importer's local bank.
- Importer initiates port clearances with the Nigerian Customs Service as well as inspections and clearances by NAFDAC, the Nigerian Drug Law Enforcement Agency and sometimes, the Standards Organization of Nigeria and other agencies stationed at Nigeria's ports (on average two weeks).

Flowchart for Documentations, Procedural Steps & Estimated Durations

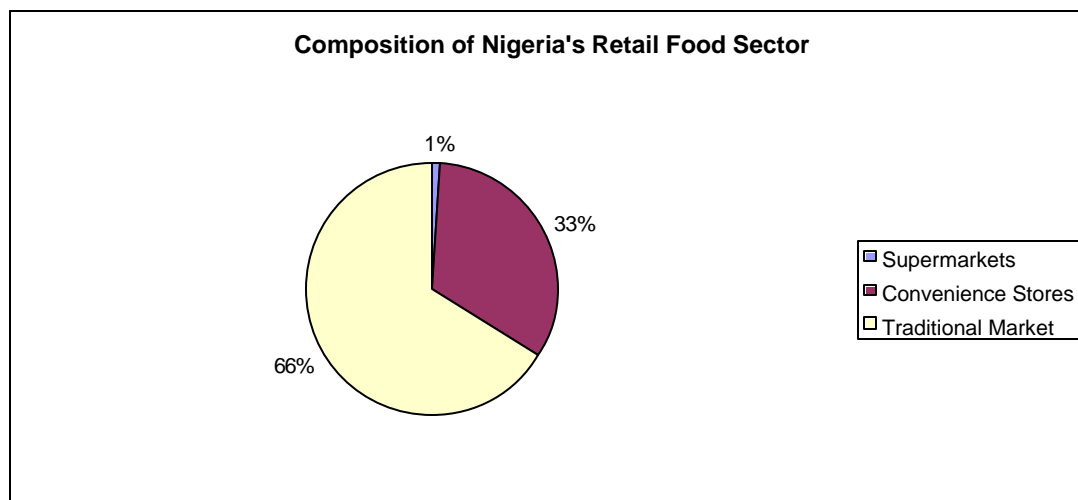


- ❑ Opening letters of credit in Nigeria often is a time-consuming and expensive endeavor
 - Many Nigerian importers arrange payment for their imported food items through Inter-bank wire transfers
 - The exporter simply ships the items to importer upon receipt of his bank transfer payments avoiding the rigors of Form M and PSI procedures
 - This import procedure (now classified as "non-IDR imports") has become a high risk to the importer as GON recently expressed the postponement of its proposed single (destination only) inspection policies.

SECTION III. MARKET SECTOR STRUCTURE AND TRENDS

Retail Food Sector:

- ❑ The retail food sector in Nigeria consists of supermarkets, convenience stores/small groceries, and traditional open-air markets--accounting for approximately one percent, 33 percent and 66 percent respectively, of total retail food sales as shown below:



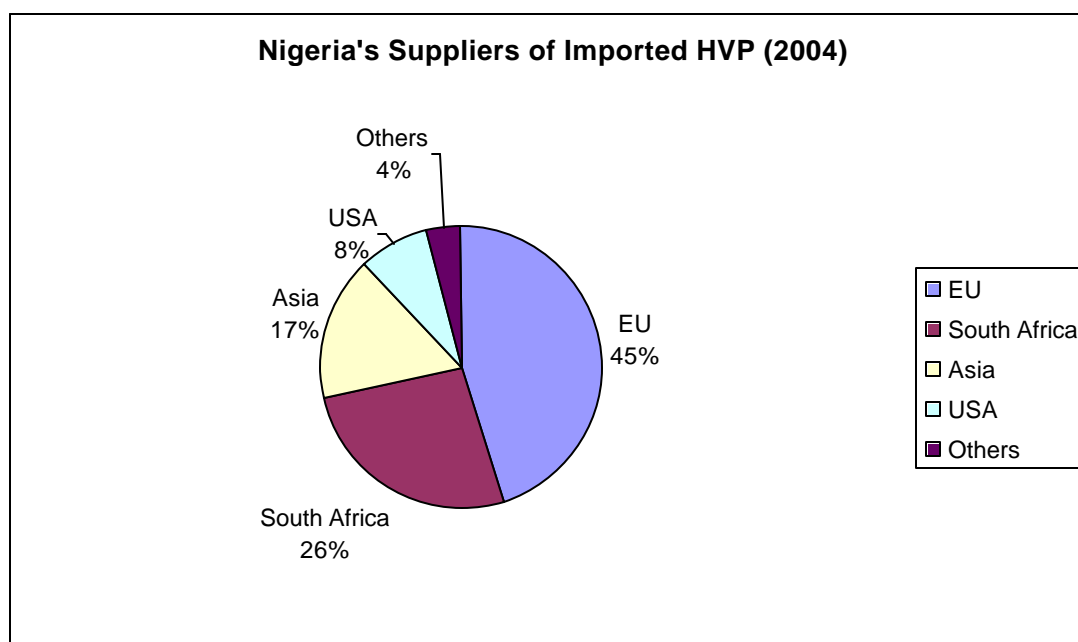
Source: Industry

- ❑ The major players for imported HVP merchandising in Nigeria are:
 - Importer-distributors
 - Agents/Sole Representatives
 - Wholesalers
 - Sub-Wholesalers/Super-retailers
 - Retailers
 (See Post's Retail Sector Report No. NI3029 for the illustrated details)
- ❑ The spate of GON bans on a number of HVP items, has led to some drop in HVP imports compared to last year. Industry estimates of Nigeria's retail food sales are forecast at about \$14.5 billion in CY2005, with imported, high-value products accounting for two percent (\$290 million). This will represent a drop by eight percent compared to 2004.
- ❑ The GON has, on many occasions, since 2001 shifted the implementation date for closing supermarkets stocking banned HVP products. Supermarket operators legally challenge the GON that Nigeria's food processors can barely produce 15 percent of stocking requirements.
- ❑ The GON's threat to seal supermarkets stocking banned items after July 2005 (implementation has not begun), has created uncertainties in the market place and supermarket operators' plans to open new outlets are suspended.
- ❑ However, smaller retail outlets in the more predominant traditional sector are gradually increasing in number. The majority of Nigerian consumers continue to rely on the traditional sector (wet markets) for their household needs.

- Nigeria has proposed to begin the full implementation of its Common ECOWAS Tariff (CET) agreement from January 2008. Accordingly, the GON plans to phase out all import bans by 2007 and reduce Nigeria's existing 20 different tariff categories to the following five:

Category	Tariffs	Products
Category 1	0%	Necessities such as books, medicines, newspapers etc
Category 2	5%	Raw materials and capital goods
Category 3	10%	Intermediate goods and other inputs
Category 4	20%	Finished goods
Category 5	50%	Products currently banned for imports

- HVP imports are expected to increase if the agreement is carried out. Some foreign retail giants (especially from South Africa) anticipate a favorable future environment for the retail food sector, and are already investing in retail shopping plazas in Nigeria (See GAIN Report #: TPR NI5007 for CET details)
- Industry estimates the origin and supply of imported consumer-ready food products in 2004 are as shown below:



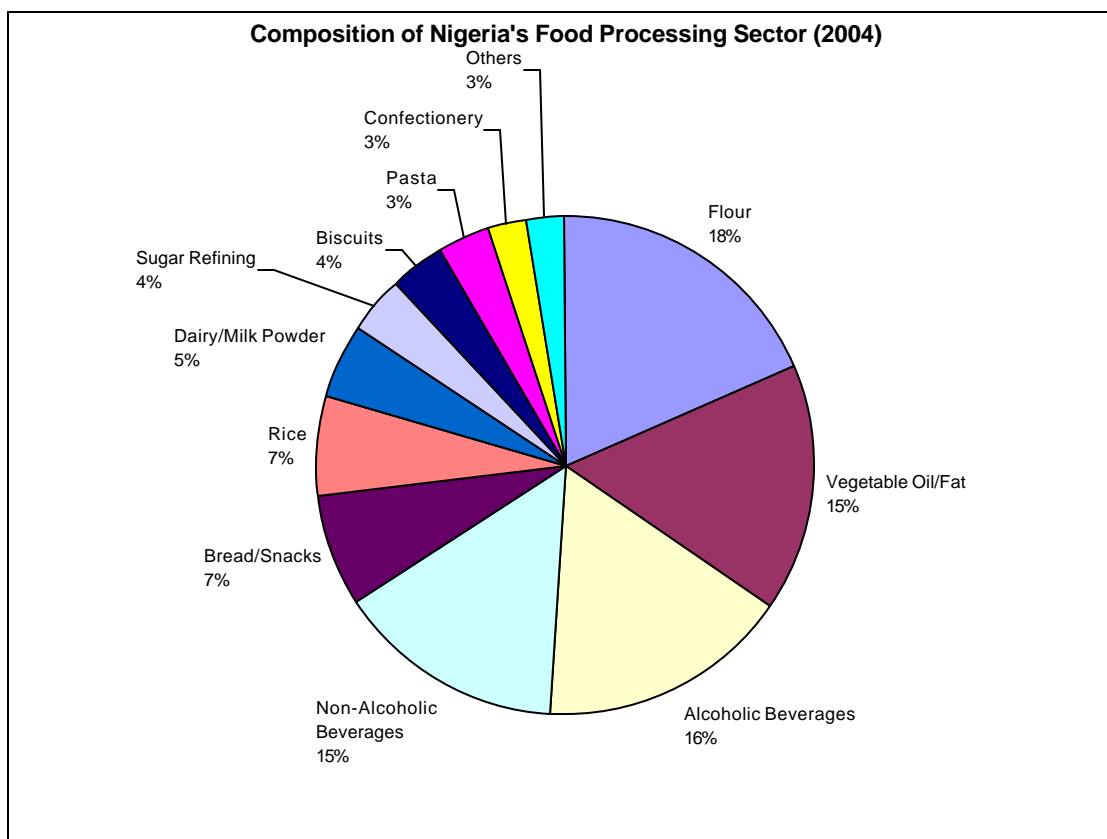
Source: Industry Estimate

- The value of US HVP sales in CY2004 is estimated at \$25 million, representing approximately eight percent of total HVP imports (approx. \$315 million). The U.S. market share in CY2003 was six percent of total HVP imports (\$560 million). The GON's adoption of destination inspection is reducing under-invoicing activities of third country competitors and is assisting in enhancing the competitiveness of US exports (See GAIN Report #: NI4015).

- ❑ However, the U.S. market share remains low. The low U.S. market share is mostly attributed to:
 - Higher freight charges for shipments from the US
 - Unfavorable perception of Nigerian firms in the US
 - U.S. exporters' less responsiveness to the Nigerian importer demands especially, on documentation and product specifications
 - Lack of sufficient contact between Nigerian importers and U.S. HVP exporters

Food Processing

- ❑ Nigeria's food processing sector has a relatively small share of GDP. While no official data is readily available, the AgOffice estimates that about 50 percent of the manufacturing sector is food processing. According to the Economist Intelligence Country Report May 2005, manufacturing had an estimated 4.4% share of GDP (\$65 billion) in 2003.
- ❑ Over the last few years, the government of Nigeria has imposed a wide range of import bans to protect manufacturers, including food processors. The estimated average growth rate of the industry over the last five years is ten percent. Nevertheless, the industry still faces a number of constraints including poor infrastructure and the GON's inconsistent policies—allegedly, often initiated on political basis.
- ❑ Chart below shows the composition of Nigeria's food processing sector in 2004:



Source: FAS Lagos & Industry Estimates

- ❑ Nigeria is predominantly a mass sales market due to low consumer purchasing power. Manufacturers are however, increasing sales and market share by packaging and selling products in affordable small units for one-time use.
- ❑ The standard Nigerian diet is high carbohydrate but the number of discerning consumers requiring low-carb, low-fat, sugar-free food and beverages, is increasing. There are also, growing concerns (among the high- and middle-income Nigerian consumers), regarding food safety and dietary quality. Local processors are developing and improving products to meet the needs of this consumer niche.
- ❑ FAS Lagos is unable to estimate the total foreign direct investments in the sector. However, industry sources are reporting an increasing trend. Proctor & Gamble as well as some other multi-national food processing firms also manage medium-large sized operations; Seaboard Inc. (USA) owns 80 percent equity in Seaboard Group (Nigeria) producing poultry feeds and milling wheat flour; Coca-Cola has reportedly invested over \$200 million in the sector which includes, a "Five-Alive" fruit juice processing and packaging plant in 2002; etc. (See GAIN Report #: NI5011 for details)
- ❑ The GON has recently abolished its export incentives programs (Bona-fide Manufacturers Scheme and Manufacturer-in-Bond Export Scheme initiated to make products of local manufacturers competitive) allegedly abused through corrupt practices. Local manufacturers claim that it is a disincentive as no manufacturing can profitably take place in Nigeria without these incentives due to GON's high trade barriers. These included the GON's 40-percent rebate on exported local agricultural products [Export Expansion Grant (EEG)] introduced in 2002 to motivate local firms toward improving product quality and packaging, to meet international standards. Nigerian firms about 15 large processors (such as West African Milk, Guinness, Nigerian Breweries, Nestle, etc) were able to export to the EU, Asia and other African countries through the scheme.
- ❑ FAS Lagos estimates that 65% of inputs used in the food processing industry are imported. The total value of these imports is estimated at \$2 billion. Export sales potentials are evident for these inputs:

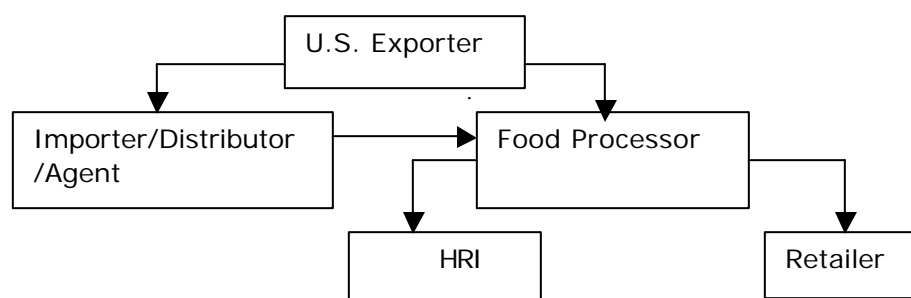
Bulk	Intermediate	Processed
Barley and Malt Edible Fat Raw Sugar Refined Sugar Vegetable Oil Wheat** Paddy Rice	Corn Starch Ethanol Fruit Juice Concentrates, pre-mixes & syrup Ice Cream Pre-mixes Milk powder Nutrients & Additives Other Beverage Bases Flavors & Sweeteners Industrial Salt	1) Baking mixes, Yeast & Baking Powder 2) Jam & Jellies 3) Mayonnaise 4) Salad Dressing 5) Table Salt 6) Sauces, Spices 7) Tomato Ketchup, etc

Notes: * Wheat flour is banned for import

* Poultry & Red meat, vegetable oil & fat and corn are placed under import ban although domestic production is grossly inadequate for local food processors

- ❑ Third-country suppliers from the EU, Asia, South America as well as South Africa show great interest in the market and are quick to learn about the requirements of this growing sector.
- ❑ Nigerian food processors generally perceive U.S. ingredients suppliers as a reliable source, in terms of volume, standards and quality. U.S. ingredients exports are constrained by: Nigeria's restrictive trade regime; lack of adequate market knowledge; limited contacts between Nigerian processors/importers and U.S. suppliers; competition from EU and Asian countries; relatively higher US freight cost; negative image of Nigerian businesses in the U.S. and; low consumer purchasing power, etc.
- ❑ Generally, third-country suppliers: 1) have better knowledge and understanding of Nigeria's market and local practices 2) are more flexibility regarding importers' requirement (quality, packaging and documentation, etc) 3) approach Nigeria's market more aggressively; and 4) enjoy relatively lower freights; etc.
- ❑ U.S exporters are not aware of the market potential in Nigeria's food processing sector. New-to-market U.S. exporters of intermediate foods can enter the market through 1) food processors/manufacturers 2) importers/distributors/agents and 3) HRI firms as indicated the flowchart below:

Exporter Entry Flowchart for Intermediate Food & Ingredients



- ❑ Regardless of the option chosen, personal contacts with the market and players often are effective for understanding the specific requirements of the local importer-distributors as well as food processors. Post advises U.S. exporters desiring to enter the Nigerian market to: Contact the Office of Agricultural Affairs, U.S. Consulate, Lagos-Nigeria for assistance in finding an importer or processor for their products. (See GAIN Report #: NI5011 for details)

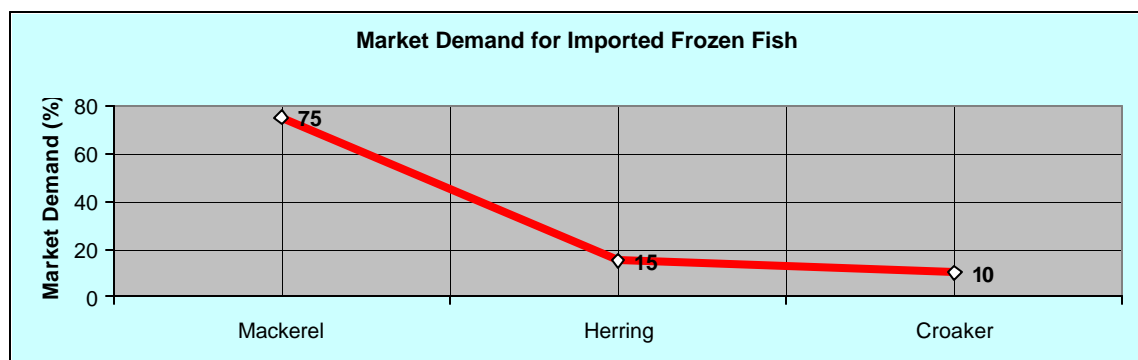
Food Service (HRI) Sector

- ❑ Nigeria's food service sector has expanded over the past five years and currently provides some opportunities for US exporters of consumer-ready food products and food ingredients.
- ❑ The Nigerian restaurant industry reported sales of approximately \$3 billion during 2004. The sector is growing at approximately 12 percent annually. Outlets of quick service restaurants are growing faster than other restaurant types.
- ❑ Industry sources estimate the total revenue of fast food operations at approximately \$385 million in 2004 and the annual growth rate at an average of 40 percent over the past five years.

- ❑ The trend is assisting in increasing local demand for processed potato chips, sauces, seasonings, pastry mixes, seafood, canned foods, wine, ice cream and other processed foods that are utilized by the fast food sub-sector.
- ❑ Nigeria's demographics and lifestyles are changing with more women working outside the home and the younger consumers, adapting western tastes and preferences especially for convenience-typed foods and snacks--have chiefly contributed the growth of Nigeria's food service sector.
- ❑ Nigeria's increasing eat-out culture has resulted in the significant growth of the fast food chains.
- ❑ Hotels meeting international standards are few but growing steadily. Abuja, Lagos and Port Harcourt are the ideal cities in Nigeria for focusing sales efforts toward the HRI sector. (See GAIN Report #: NI4023)

Seafood/Frozen Fish

- ❑ The GON's reduced tariff on all fishery products (including fin fish and invertebrates) from 25 percent to 5 percent in 2001 and Nigeria became a major destination for imported seafood.
- ❑ Total Nigerian seafood imports increased to approximately 700,000 MT valued more than \$500,000 in 2004 from estimated 300,000 MT in 2001. [Industry/FAS Lagos Estimates].
- ❑ Mackerel, herring and croaker are the major species imported into Nigeria as shown in the diagram below:



- ❑ Fish are affordable for much of the local population. Deep-sea shrimp are mostly sold to overseas markets although some remain for the restaurant/hotel sector and retail trade for high-income households.
- ❑ Export sales of U.S. seafood (especially frozen mackerel, herring, croaker and salmon) to Nigeria reached more than eight million dollars in 2004 from about three million dollars in 2002. U.S. market share is negligible despite the export growth.
- ❑ Buyers report that freight rates from competitor countries (especially the EU) are about half the cost of the US and constrain trade.

- ❑ The EU countries, especially the Netherlands, are the dominant suppliers. Other supplying countries include: China, Korea, Brazil, Paraguay, Uruguay, USA & Gambia, Mauritania, Namibia, Angola, Morocco, etc.
- ❑ If brokers consolidating these frozen fish products can be found in the U.S., Nigerian importers would consider large-volume purchasing for shipment in larger reefer vessels to reduce average freight costs
(See GAIN Report #: NI4012 for details)

Aquaculture:

- ❑ Nigeria is a potential market for approximately 2.5 million MT of fish.
- ❑ Nigeria's current fish demand is approximately 1.5 million MT whereas imports and domestic production are about 700,000 MT and 500,000 MT, respectively.
- ❑ Aquaculture (especially, catfish farming) contributed 16,000 MT, about three percent of domestic supplies.
- ❑ With the increasing local demand for fish and the global dwindling fish stock, GON is collaborating with local and external stakeholders (including local farmers, World Bank, WHO, FAO, NEPAD, etc), to increase local aquaculture and fish supply.
- ❑ There will likely be increased output from the aquaculture sector in the upcoming years. This has created a niche market for U.S. exporters of aquaculture feed ingredients and additives.

SECTION IV: MARKET ENTRY STRATEGIES

- ❑ New-to-market U.S. food and agricultural products exporters should consider the following market entry strategies and tactics:
 - Contact the Agricultural Attache at the USDA/FAS office located in the American Consulate, Lagos-Nigeria for assistance in selecting a local distributor/ agent or representative.
 - Appoint a local distributor/agent or representative in Nigeria to register the products with the appropriate GON regulatory bodies, to introduce their products, and to develop consumer demand.
 - Identify and sell through consolidators based in the U.S. who are serving the West African region.
 - Exhibit at trade shows in the U.S., which are attended by Nigerian importers and where follow-up contacts can be made.
 - Offer product shipment in mixed-lot containers & Offer flexible shipping volumes.
 - Adapt pricing strategy that encourages importers to initiate buying activity with U.S. suppliers.
 - Send sample products and sales catalogs to Post to facilitate prospecting for local buyers.

SECTION V. BEST HIGH-VALUE PRODUCT PROSPECTS**HVP that are legitimate for export to Nigeria:**

- Breakfast Cereals
- Wine, including sparkling wine
- Alcoholic beverages & Spirit & Liqueurs
- Non-alcoholic beverages
- Canned vegetables
- Nuts
- Milk, Cream, Honey products (liquid or powdered)
- Spices, Sauces including, Soy Sauce, Mixed Seasoning
- Coffee, Tea & Herbal products
- Yeast & Baking Powder
- Tomato Ketchup, Mayonnaise & Salad Dressing
- Canned Soups
- Baby Foods & Health Food products
- Sweeteners & Non-Dairy Coffee Whiteners
- Powdered beverages
- Bottled Vegetable/Cooking oil
- Packaged rice
- Chocolate, etc

Product types offering the most sales potential in Nigeria:

- Frozen seafood
- Fast food & other HRI food ingredients including, ice cream and yoghurt concentrates
- Agricultural-based food ingredients
- Industrial processed foods & beverages especially, fruit juice concentrate and bulk for local re-processing and packaging
- Bakery, confectionery, and food preparation ingredients
- Specialized food ingredients such as additives, preservatives, and flavorings
- Fish-and seafood-based products, ingredients and additives for local aquaculture feedstuffs
- Relatively small-sized imported or domestic-processed HVPs, prepared and packed for one-time use

High-Value Food Products attracting high tariffs:

- Spices & Herbs (100%)
- Breakfast Cereals (100%)
- Fruit/Nut Mixtures-Peanut Butter (100%)
- Condiments/Sauces & Seasonings (50%)
- Ice Cream/Edible Ices (100%)
- Margarine (100%)
- Distilled Beverages (100%)
- Tapioca and Substitutes (100%)
- Sparkling Wine (100%)
- Mixes, Dough (100%)
- Jams, Jellies & Fruit Glace (100%), etc

Products Not Present in Significant Quantities But Have Good Sales Potential:

- Sugar
- Beverage Bases
- Dairy Products (Whole & Skimmed Milk powder)

Products Banned for Exports to Nigeria:

Confectionery products	Flavored Yogurt Drink	Spaghetti and noodles
Fruit juice in retail packs Fresh & Dried Fruits Fruit Juice Drinks	Table water (flavored, sparkling and non- sparkling)	Sugar Confectionaries (other than Chocolate)
Non-alcoholic Wines Beer	Cocoa butter, powder & cakes	Poultry & Red Meat Eggs & Birds
Maize, Sorghum, Millet	Vegetable Oil & Fat	Biscuits of any type

SECTION IV. POST CONTACT AND FURTHER INFORMATION

Agricultural Affairs Office
 American Consulate
 2, Walter Carrington Crescent
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National Agency for Food & Drug Administration & Control (NAFDAC)
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APPENDIX I. KEY TRADE & DEMOGRAPHIC INFORMATION

Agricultural Imports From All Countries (\$b) / U.S. Market Share (%) *1	2 / 15
Consumer Food Imports From All Countries (\$m)/ U.S. Market Share (%) *1	340 / 6
Edible Fishery Imports From All Countries (\$m) / U.S. Market Share (%) *1	570 / 0.7
Total Population (Mil) / Annual Growth Rate (%)	133 / 3
Urban Population (Mil) / Annual Growth Rate (%)	67 / 3.5
Number of Major Metropolitan Areas *2	25
Size of the Middle Class (Millions) / Annual Growth Rate (%) *3	6 / 2
Per Capita Gross Domestic Product (U.S. Dollars)	375
Unemployment Rate (%)	2.7
Per Capita Food Expenditures (U.S. Dollars)	235
Percent of Female Population Employed *4	Not Available
Exchange Rate (US\$ 1= 130) *5	130

Footnotes

*1/ Industry Estimate

*2/ Population in excess of 1,000,000

*3/ Middle class is the proportion of the population earning an average annual income of \$600 to \$2,000

*4/ Percent of total number of women (15 years old or above)

*5/ Exchange rate the previous year was US \$1=131.7)

Note: This report does not include Tables B and C since the FAS web-enabled UN Trade Database does not contain statistics for Nigeria